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# MODULE 3: Decision Maker Module

# USER MANUAL v.3

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# Table of Contents

1A-2023-28955-000002

# Revision History

| Draft Version | Description | Date | Author |
|---|---|---|---|
| Draft v0 | Description and detailed instructions of how to use new Chinook + and GCMS Chinook Tab (Stage 2 of Rollout) | 27FEB2020 | Lisa Catana |
| v1 | Amendments to Biometrics Logic | 10MAR2020 | |
| v2 | Amendments to Logic Inclusion of SP/WP/EXT functionality | 27APR2020 | Lisa Catana |
| v3 | Update to screenshots and functionality for Mod 3 – excludes Chinook+/Chinook Tab | 16JUN2020 | Lisa Catana |

# Contact

For any questions and/or comments relating to Chinook please contact the Chinook mailbox at
IRCC.INChinook-ChinookRI.IRCC@cic.gc.ca

s.16(1)(b)

s.16(1)(c)

# What is Module 3 – Decision Maker Module?

The Module 3 - Decision Maker Module is a tool that aims to increase the quantity of decisions that an officer can make on any given day as well as improve the quality of those decisions.  Increased efficiency is gained by bringing a range of pertinent information required for making decisions together in one place where it can be reviewed easily and effectively. Module 3 is organized in such a way that efficiencies of scale can be produced by processing like cases together and facilitating grouping in the finalization process.

# Set up and get started

| | |
|---|---|
| **Setting up your workstation** | 1. For best results, organize workstation so that you have one monitor in a landscape orientation (to be used with Chinook) and your other in Portrait (to be used for GCMS). |
| **Set-up for Chinook Module 3** | 2. Open *Chinook – Module 3 – Viewer.xlsb*<br>3. Read the Disclosure dialogue box and click *OK* |

MODULE 3 - Decision Maker                                        ✕
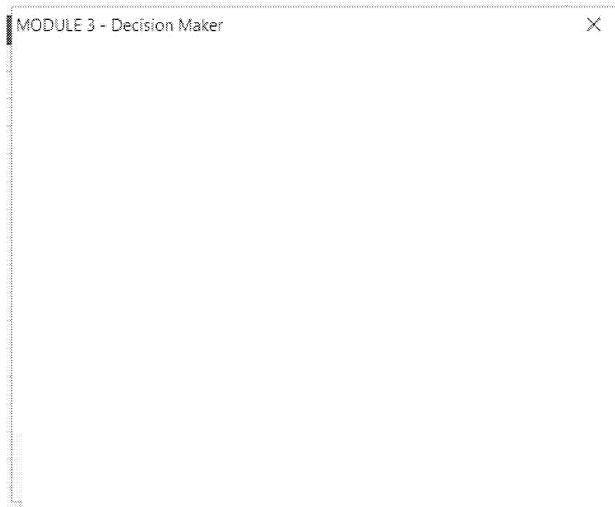
4. **Enter your GCMS ID:** When prompted, enter your GCMS ID



**Data Path**

5.



6.

1A-2023-28955-000005
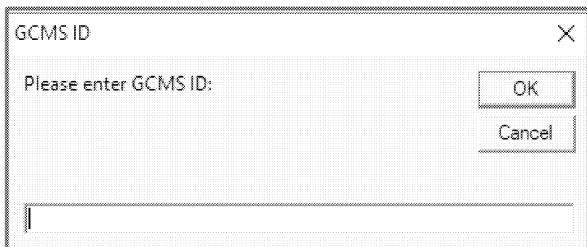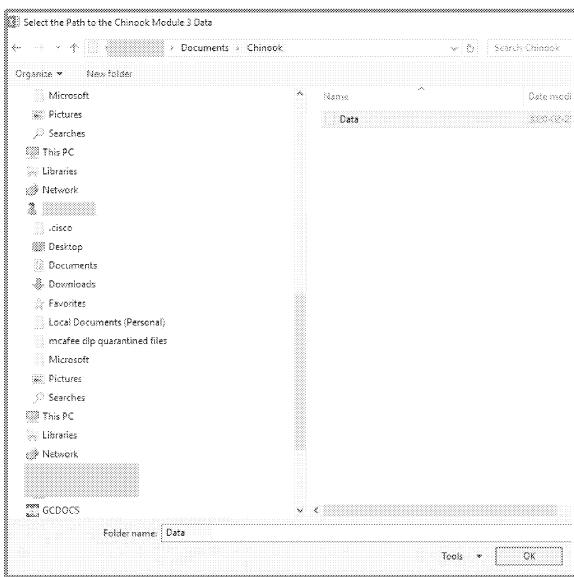
## Using the Settings button

7. Click on the *Settings* icon, on the left hand tools menu.

8. **Basic Setup Tab :: User Info**

9.

10.

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## Using the Settings button (continued)

11. **Column Setup Tab:** Use the checkboxes to customize the Module 3 columns displayed. Unchecking a box will hide that column from view.
    - Ex. If your office does not conduct pre-assessment, hide this field to save space on your screen.

**s.16(1)(c)**

Progress Bar
and Hot Keys

12. **Progress Bar:** On the left hand side of the Module 3 worksheet, there is a progress bar for users to easily see the number of applications entered into the tool, and how many have been actioned.  The progress bar will update as you complete the Action column for any application.
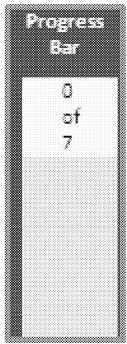


13. **Navigation:** As Chinook is an Excel based tool, you can use hot-keys in Excel to facilitate navigation.  The Chinook Decision Maker Module has various hotkeys built in to limit the user's need to use the mouse.  Hotkeys options are indicated by underlining a letter on the button/action.

**1A-2023-28955-000008**
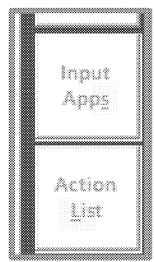
See below for some examples:

| Hot Key | Function |
|---|---|
| Home/Debut | Will return your viewer back to Column F. |
| ALT+D | Open Display Popup |
| ALT+L | Launch Action List |
| ALT +S | Launch Input Apps Window |

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# Inputting & Reviewing Applications in Module 3

**Inputting Apps**

1. **Input Applications**
   - To input applications, click the *Input Apps* button on the left hand Tool Menu.
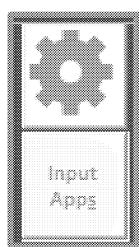
   - A warning message will pop-up advising that any filters/sorting currently used on the Module 3 sheet will be cleared. Click *Yes* to proceed.
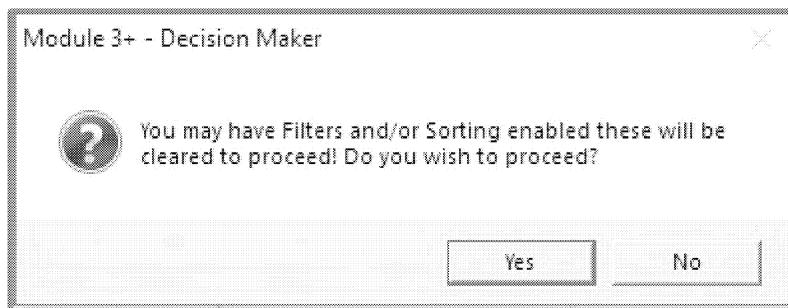
   - Enter Application numbers and/or Group numbers in the Input Apps window when prompted. Click *Input Applications* when complete.

     *NOTE:* If you enter both Group and Applications numbers, the group numbers will be pasted in first to the tool, then the application numbers.

1A-2023-28955-000010

s.16(1)(b)

s.16(1)(c)

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**Inputting Apps (continued)**

- Once applications entered, the tool will advise that is about to retrieve the data and may appear unresponsive.  Click Yes and wait for the data to be populated for the applications entered.
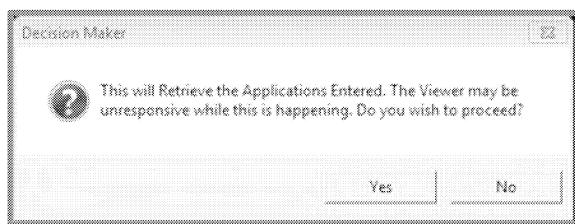


- You can monitor the status of the data upload in the bottom left-hand corner of the Excel screen.



**Reviewing Applications**

2. Each row in Module 3 will display the relevant information for the application.  Use the scrollbar in the bottom right corner of the workbook to see more info.

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**s.16(1)(b)**

**s.16(1)(c)**

**Reviewing
Applications
(continued)**

- **Client & Application Information**: All the info under the **Client & Application Info** section is presented just as the client has declared in their application forms.

- **Activity & Employer/School/Facility:** The default will display the client's stated activities in reverse chronological order. To view all declared employment/education history simply click anywhere in the cell to expand to full view.

Activity & Employer/School/Facility

2018/08 to 2019/12 - SELF EMPLOYED @ ▮▮▮▮▮ LIMITED -

2010/09 to 2016/05 - Student / Étudiant @ ▮▮▮▮▮

2018/04 to ####/## - Business Owner (Car Rentals) @ ▮▮▮
▮▮▮▮▮ - Trinidad and Tobago ▮▮▮

2016/11 to ####/## - Operational Manager @ ▮▮▮▮
▮▮▮▮▮ - Trinidad and Tobago ▮▮▮

2013/01 to 2016/06 - Student / Étudiant @ ▮▮▮▮
▮▮▮ Nigeria (Ekpoma, Edo state, Nigeria) - [### -
▮▮▮▮▮

- ▮
  ▮
  ▮

StatQs (positive answer)

TR **2014/06** : Have you ever been

TR **2014/06** : Have you ever been

TR **2014/06** : Have you ever been

TR **2014/06** : Have you ever been
refused a visa or permit, denied entry
or ordered to leave Canada or any
other country?
Add Details: 2b: 2b) Y

- **Previous GCMS History:** '

1A-2023-28955-000012

## Reviewing Applications (continued

**GCMS Info**

Previous GCMS History
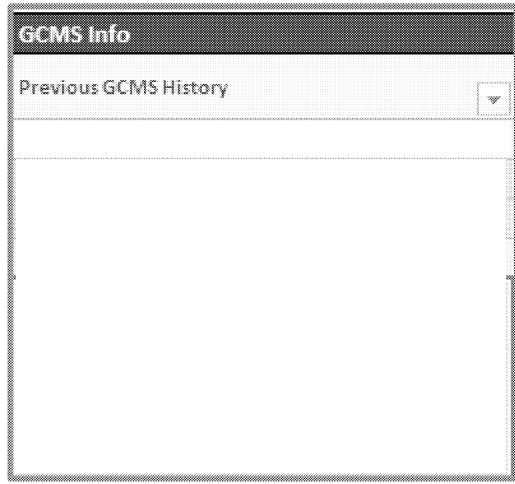
## Sorting & Filtering

3.  There are a number of ways use simple Excel functions to help organize the applications and the data in Module 3 using the Sort/Filter drop-down button on each column.

| Citizenship | ▼ | CoR | ▼ | Gender | ▼ | Marital Status | ▼ | Age | ▼ | Purpose of Visit | ▼ |
|---|---|---|---|---|---|---|---|---|---|---|---|

4.  **Sorting**:
    - *Sort A to Z or Sort Z to A:* These will sort the list of data in alphabetical order or reverse alphabetical order.

    -

s.16(1)(c)

**Sorting &
Filtering
(continued)**

| GCMS Info | | GCMS Info |
| --- | --- | --- |
| ▼ Previous GCMS History | ↓ Associated Organisations | Previous GCMS History ▼ |
| A↓ Sort A to Z | O⬛⬛⬛⬛ 2020-01- | |
| Z↓ Sort Z to A | | |
| ✓ Sort by Color ▶ | Sort by Cell Color | |
| Clear Filter From "Previous GCMS His..." | ✓ | |
| Filter by Color ▶ | | |
| Text Filters ▶ | No Fill | |
| Search 🔍 | Custom Sort... | |
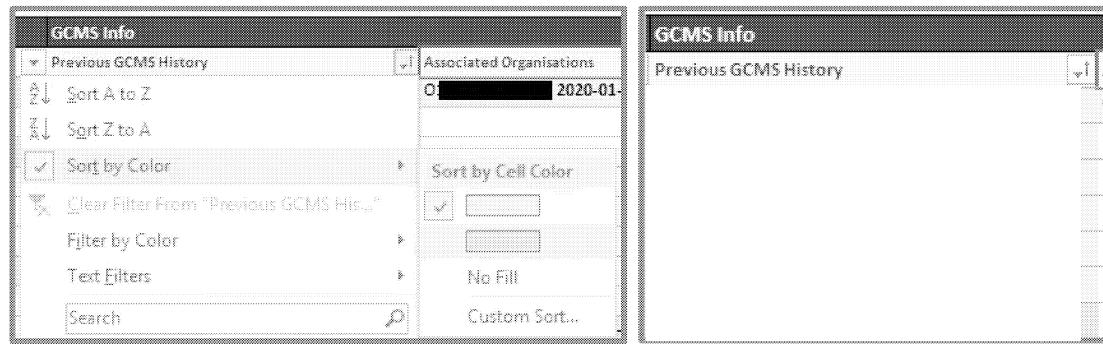
- *Multilayered Sort:* To combine different elements, click the down arrow and select "Sort by Color" (even if there are no colors) and then click "Custom Sort". This will provide options to run a multilayered sort first sorting by one column, and then another within that initial sort.

*NOTE:* Be careful when sorting and filtering that you don't accidently split groups (by applying filters that do not apply to all members of that group).

**5. Filtering:**

- *Filter checkboxes:* Use the checkboxes to filter your list. For example for the Citizenship column, you can restrict view to only applications of the same country.

| ▼ SPC | ▼ Rec'd Date | ▼ Citizenship | ▼ |
| --- | --- | --- | --- |
| A↓ Sort A to Z | | | |
| Z↓ Sort Z to A | | | |
| Sort by Color ▶ | | | |
| Clear Filter From "Citizenship" | | | |
| Filter by Color ▶ | | | |
| Text Filters ▶ | | | |
| Search 🔍 | | | |
| | | | |
| OK Cancel | | | |

**1A-2023-28955-000014**

## Sorting & Filtering Continued)

| | Sort A to Z |
|---|---|
| | Sort Z to A |
| | Sort by Color ▶ |
| | Clear Filter From "Activity & Employ..." |
| | Filter by Color ▶ |
| | Text Filters ▶ |

| Text Filters | ▶ | Equals... |
|---|---|---|
| Search | | Does Not Equal... |
| ☑ (Select All) | | Begins With... |
| ☑ 1980/08 to 2012/07 - | | Ends With... |
| ☑ 1983/07 to ####/## | | Contains... |
| ☑ 2003/01 to 2013/01 - | | Does Not Contain... |
| ☑ 2008/12 to ####/## | | Custom Filter... |
| ☑ 2011/08 to 2014/05 - | | |
| ☑ 2014/03 to 2016/03 - | | |
| ☑ 2016/01 to 2016/04 - | | |
| ☑ 2016/12 to 2020/01 - | | |

OK     Cancel

| ▼ Purpose of Visit Info | ▼ Activity & Employer/School/Facility | ▼ Self Declared Tr |
|---|---|---|
| ██████████████ | 2016/01 to 2016/04 - Student / Étudiant @ ████ | |

**Custom AutoFilter**                                    ?   ✕

Show rows where:
Activity_Employer/School/Facility

| contains | ▼ | School Y | ▼ |
|---|---|---|---|

○ And   ● Or

| contains | ▼ | Company X | ▼ |
|---|---|---|---|

Use ? to represent any single character
Use * to represent any series of characters

OK     Cancel

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# Finalizing Applications in Chinook

**Using the Action Column**

1. The Action column is where to indicate the intended action/decision to be taken for each application. Review the application and the information provided in Chinook. When you've determined what action is needed, click on *Action* column cell corresponding to the application.

2. **Hover over feature:** Hover over any cell in the Action column to quickly view the notes entered for an application.

3. **Working Note:** This field can be used as an electronic "post-it note" to mark any particular or special action required on an application. The working note DOES NOT get included as part of the note to be copied into the Notes tab. It is only for reference. For example, as you review the application and had concerns of the client's employment, you could enter a working note stating "review employment documents" as a reminder.

4. **To enter an action for a single application**: Highlight the Action cell corresponding to an application to launch the Action Window.

5. **To enter an action for a multiple applications:** In the Action column, highlight multiple cells for the corresponding applications to launch the Action Window then enter in the desired action and click Save Action & Notes.

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**Using the Action Column (continued)**

Alternatively, enter the action on a single application, then click hold down the Action cell and drag across all the application for which you want the action to apply.

| Officer Section | | | |
|---|---|---|---|
| Application # | Group # | Action | |
| S3 | 2-S | Approval | |
| V3 | | | |
| W: | 2-S' | | |
| W: | | | |
| V3 | | | |
| V3 | | | |
| V3 | | | |

| Officer Section | | | |
|---|---|---|---|
| Application # | Group # | Action | |
| S3 | 2- | Approval | |
| V3 | | Approval | |
| W | 2- | Approval | |
| W | | Approval | |
| V3 | | Approval | |
| V3 | | Approval | |
| V3 | | Approval | |

6. **Approvals**: You will be presented with the following Action Window.
   - Click the *Approval* checkbox.
   - Ensure the correct line of business is selected from the drop-down menu.
   - Once your desired actions have been entered *click Save Action & Notes*

7. **Refusals:** You will be presented with the following Action Window.
   - Click the *Refusal* checkbox.
   - Ensure the correct line of business is selected from the drop-down menu.
   - *Edit Deactivated:* This button will activate the edit function for each refusal ground. Select it before you enter your refusal grounds, and it will allow you to edit each ground separately.
   - *Refusal Reasons*: Check the boxes that correspond to your refusal grounds.
   - *Refusal Note Generator*: For each refusal ground selected, a corresponding line will be added to the refusal note. For certain refusal grounds, multiple options will be available, and you will be prompted to amend the text to reflect your application.
   - Once your desired actions have been entered *click Save Action & Notes*

**Using the Action Column (continued)**

8.  **Other:** You will be presented with the following Action Window.
    - Click the *Other* checkbox.
    - Ensure the correct line of business is selected from the drop-down menu.
    - Once your desired actions have been entered *click Save Action & Notes*

**Using the
Action
Column
(continued)**

9.  **Withdrawal:** You will be presented with the following Action Window.
    - Click the *Other* checkbox.
    - Ensure the correct line of business is selected from the drop-down menu.
    - Once your desired actions have been entered *click Save Action & Notes*

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# Creating Action Lists

**Using the Action List Button**

1. After completing review of applications and entering intended actions – click the *Action List* button. This will compile a series of application lists and query strings to facilitate batch processing in GCMS. Any working notes that you have indicated will also be carried over to the lists. A separate list will be created for each Action as follows:
   - Approvals
   - Withdrawals
   - Other (one list for each group of applications with the same action)
   - Refusals (one list for each group of applications with the same refusal grounds)
   - No Action: list of files where no action was indicated

2. After clicking the **Action list button**, a pop-up will appear to confirm if you would like to have the applications removed from the Decision Maker module.
   - Click *YES* to keep all applications listed in your Module 3 session
   - Click *NO* to remove the completed applications from your Module 3 session.

MODULE 3 - Decision Maker ✕

Do you want to clear all the Applications with an associated action from the Viewer?

Yes     No
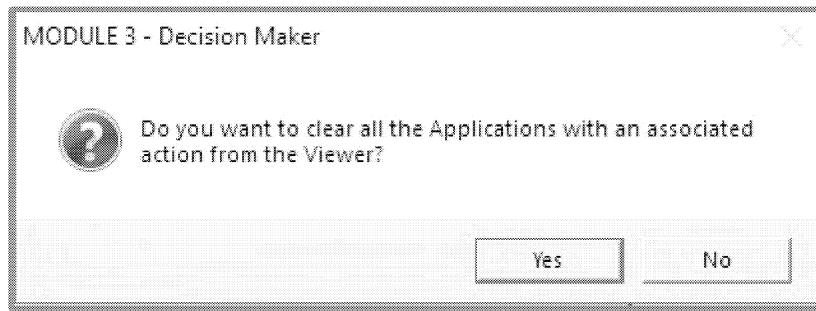
3. Once you have clicked either *YES* or *NO*, the following pop-up will appear to inform you that the actions lists have been created. Click *OK*

MODULE 3 - Decision Maker ✕

\\nhq.ci.gc.ca\users\L\Lisa.Catana\Documents\Chinook_Action
List_2020-07-03_1-39-40 PM.xlsm
Action List was created!

OK
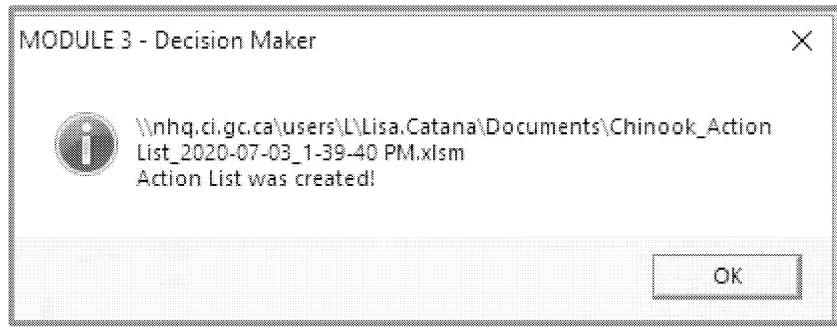
4. A new worksheet will automatically open for the action lists. Each tab of the worksheet will represent a different action:

Other-1 | Approval | Refusal-1 | Refusal-2 | Withdrawal | No Action

1A-2023-28955-000020

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**s.16(1)(b)**

**s.16(1)(c)**

**s.19(1)**

# Using Action Lists with GCMS

Action List
Overview

1.

Approval or
Withdrawal
Action Lists

2.

3. (

**1A-2023-28955-000021**

Refusal
Action Lists

4. F
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Other
Action Lists

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**s.16(1)(b)**

**s.16(1)(c)**

## Other Action Lists (continued)

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**1A-2023-28955-000023**

# Autosave Feature

**Retrieving Autosaved Action List**

Chinook Module 3 generates and saves automatically an Action List every 15 minutes in the user's temporary folder. This feature was developed to avoid losing all the work done in the event of an unexpected crash.

To retrieve the autosaved Action List, open your user temporary folder by typing %temp% in a "Windows Explorer" window and pressing "Enter":
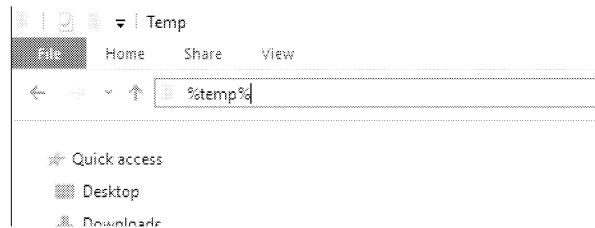


Then look for the file "Chinook_ActionList_AutoSave.xlsm" and open it.
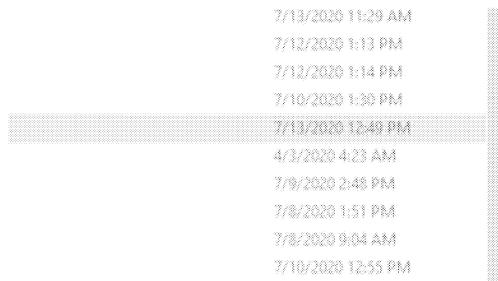


Once the file is opened, you will see the actions that you had already entered in the "Action" column at the time the last autosave was done. You can then use the file lists to enter your decisions in GCMS and to keep working in Module 3.

Note that this file is replaced every time it is saved, every 15 minutes. That means that if you want to keep a copy of the files as they were after a crash, you will need to save it in another location.

**s.16(1)(b)**

**s.16(1)(c)**

# Best Practices for Paper Applications

Processing
Paper
Application
s in Chinook